

Village of Wellington  
Equestrian Data Collection  
Presented Jointly to the  
Village Council and the  
Equestrian Preserve Committee

Presented by:  
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Village of Wellington  
with

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December 12, 2012

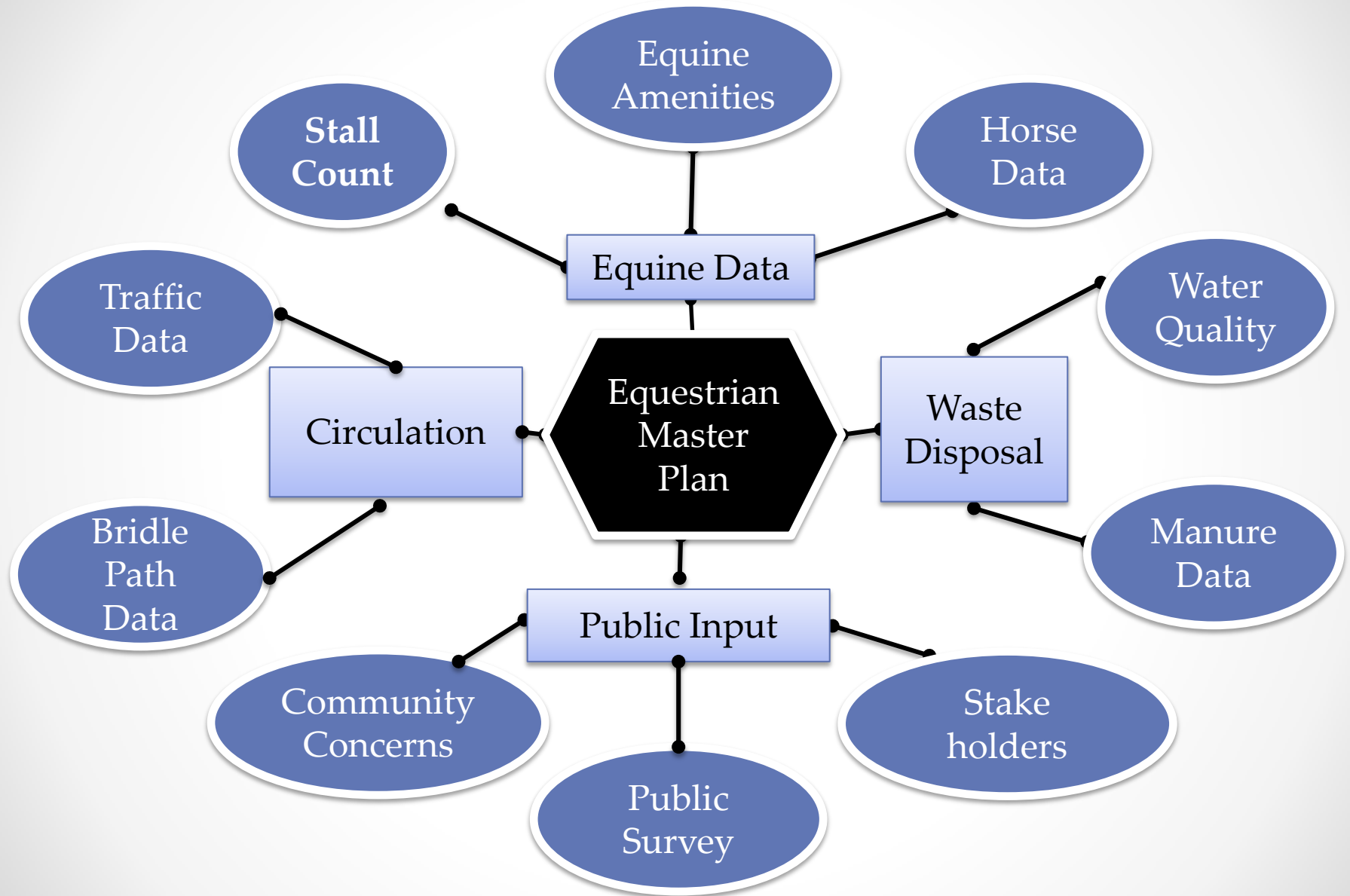
# Background

- February 2011 – Coordinate effort to collect, analysis and assemble data commenced
- December 2011, FAU was asked to help with Equestrian survey
- August 2012 Equestrian Community Data Report assembled & distributed for review / comment
- August 2012 FAU Equestrian survey results, distributed for review / comment

# Information & Process

- The EPA - comprised of 20 sections of land
- 9,200+-gross acres – 41% of Wellington's developable area
- 1,565 Individual Lots (582 farms)
- Information tools utilized:
  - ✓ Building permits
  - ✓ GIS – PB County aerial photograph
  - ✓ Palm Beach County Property Appraiser records
  - ✓ Utility and Finance records
  - ✓ Land development and zoning regulations

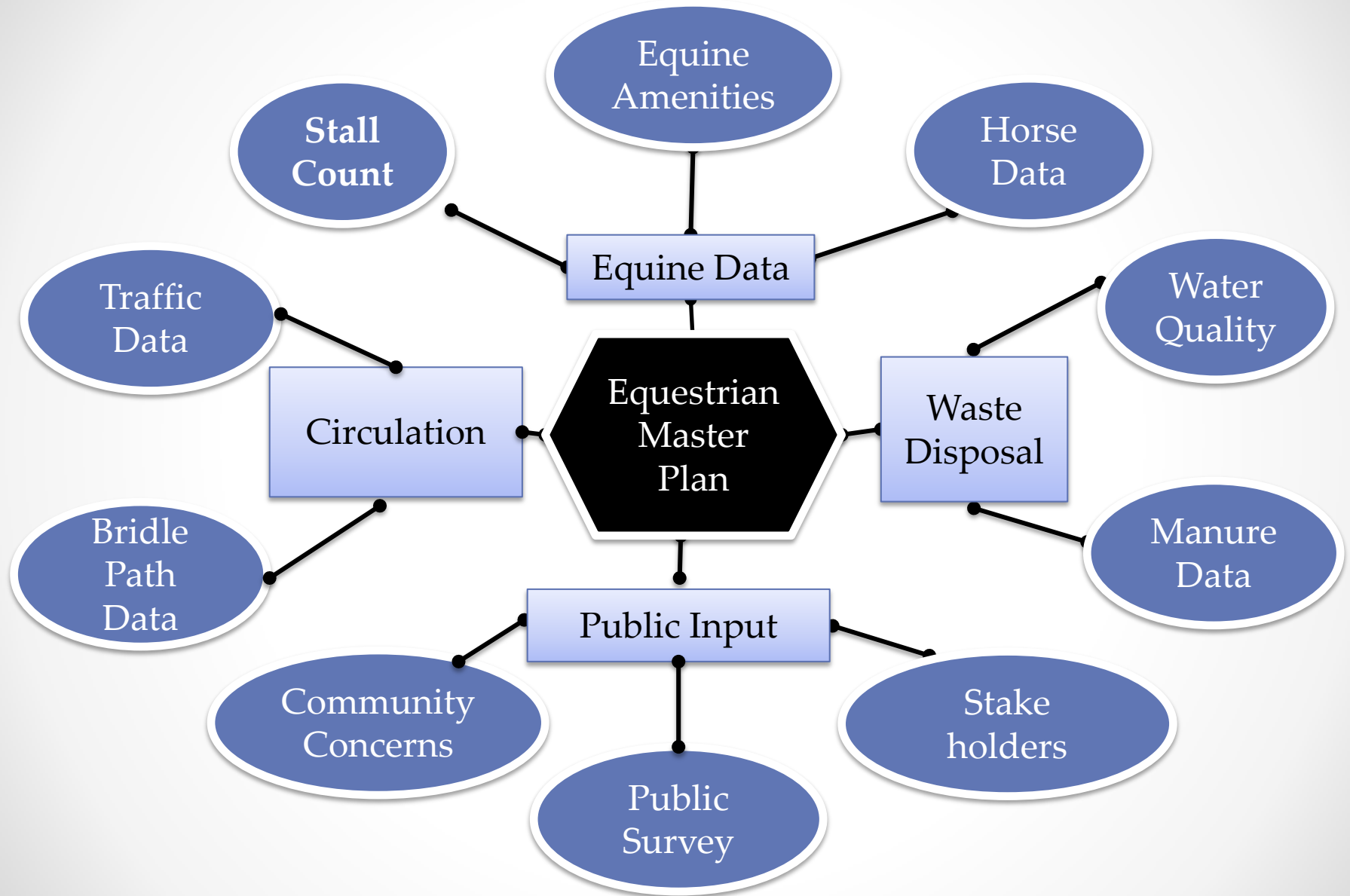
# Data gathering for Equestrian Master Plan



# Stall Count (Sept. 2011)

- 8,872 permanent stalls
- Hunter/ jumper 4,325
- Polo 1,692
- Recreation 652
- Dressage 1,019
- Combination farms 890
- pole barn stalls 294
- Temporary Tent Stable – est. yearly avg. 2,500

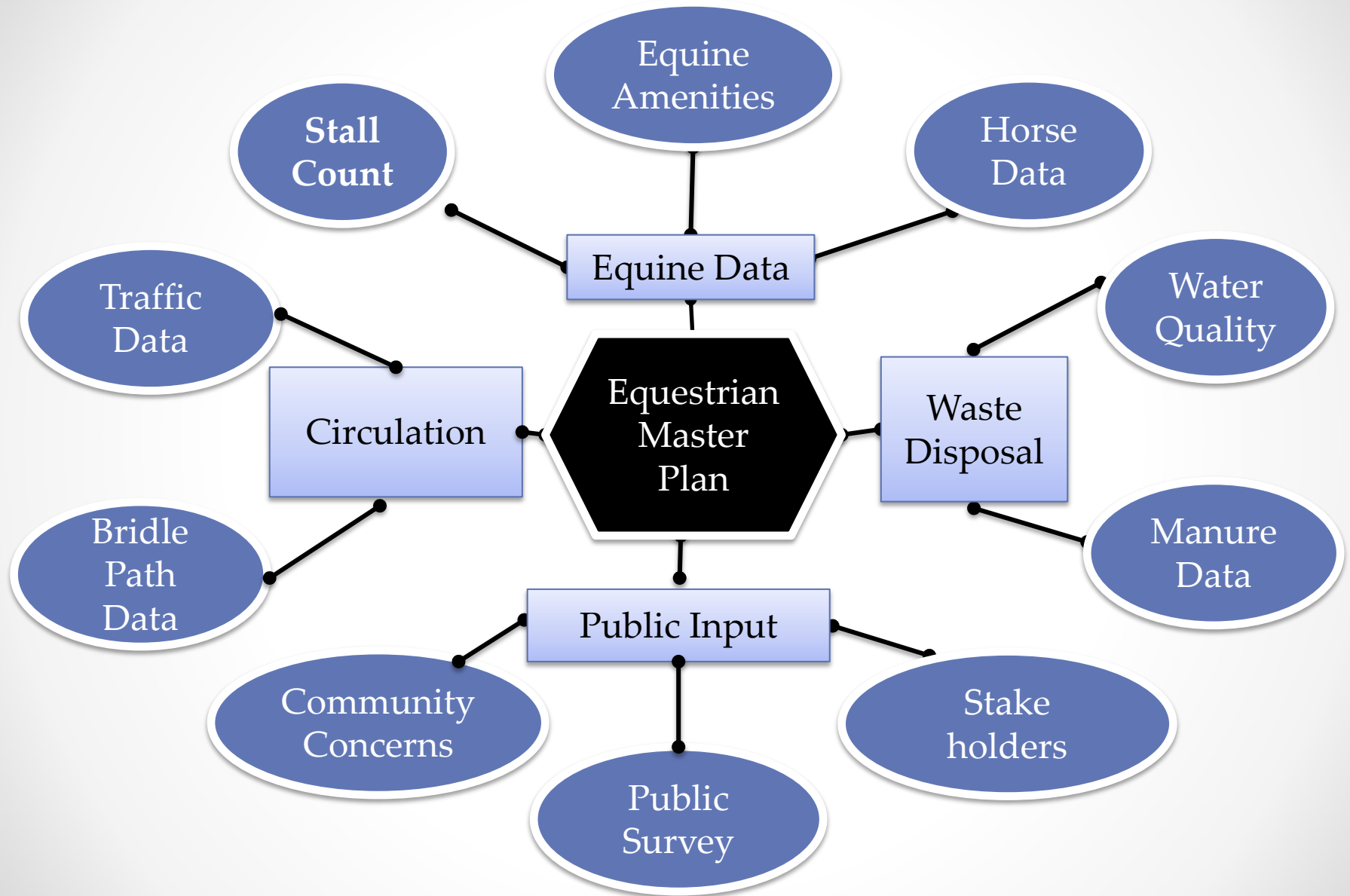
# Data gathering for Equestrian Master Plan



# Equine Amenities (2,000 acres)

- 49 polo fields (650 acres)
- 20 stick & ball fields (100 acres)
- 40 exercise tracks
- 14 covered arenas (7 acres)
- 115 dressage rings (46 acres)
- 354 sand rings (336 acres)
- 126 grand prix fields (625 acres)
- 3.2 million Sq. ft. of stables (74 acres)
- 273 grooms quarters
- 3,381 paddocks (600 acres)
- 584 manure bins (2 acres)

# Data gathering for Equestrian Master Plan

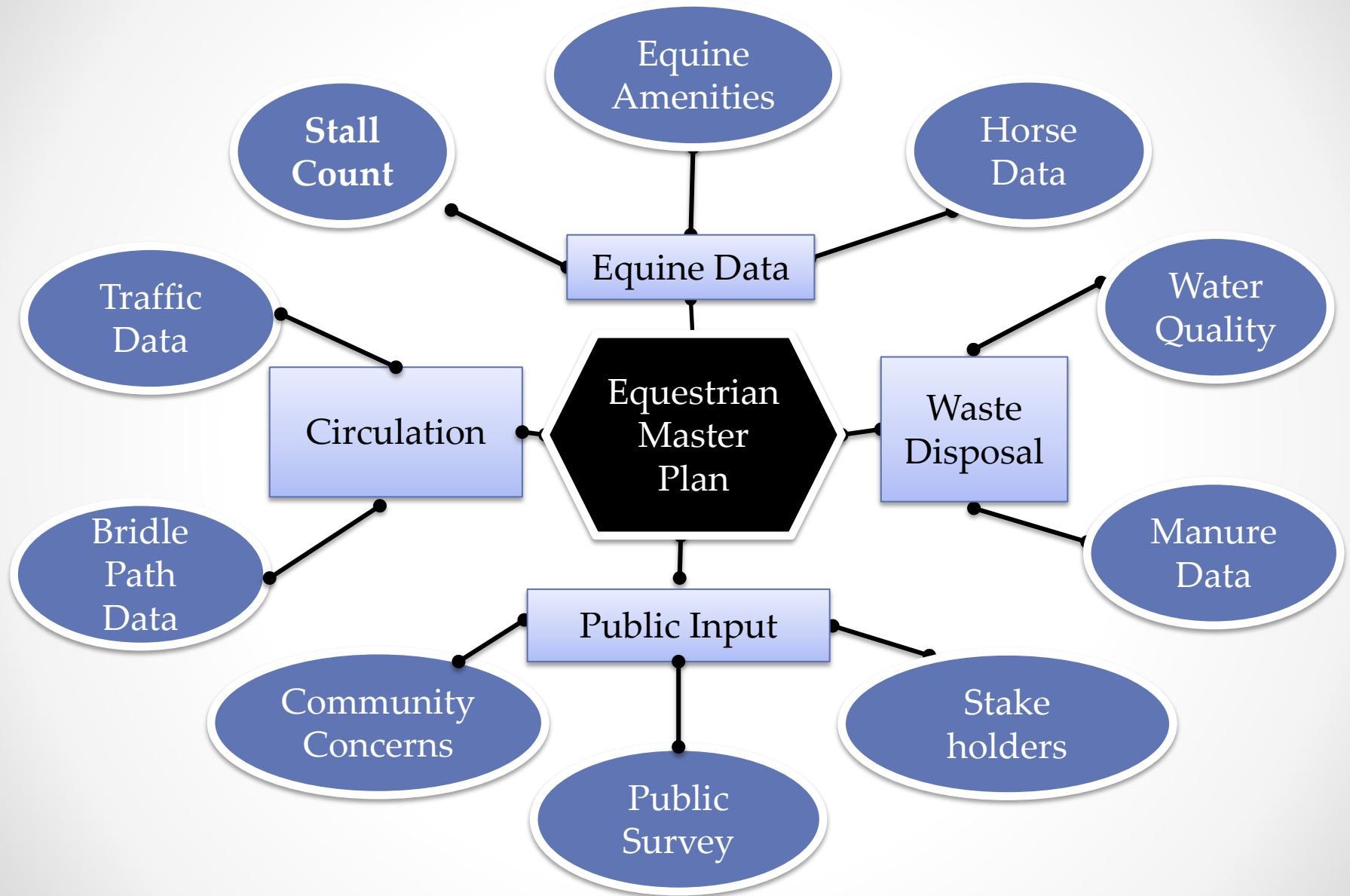




# Horse Data

- High Season 12,057
- Estimated 2,900 horses are year around
- 9,157 are transported in seasonally
- 53% Hunter/ Jumper
- 26% Polo
- 13% Dressage
- 8% Rec/other

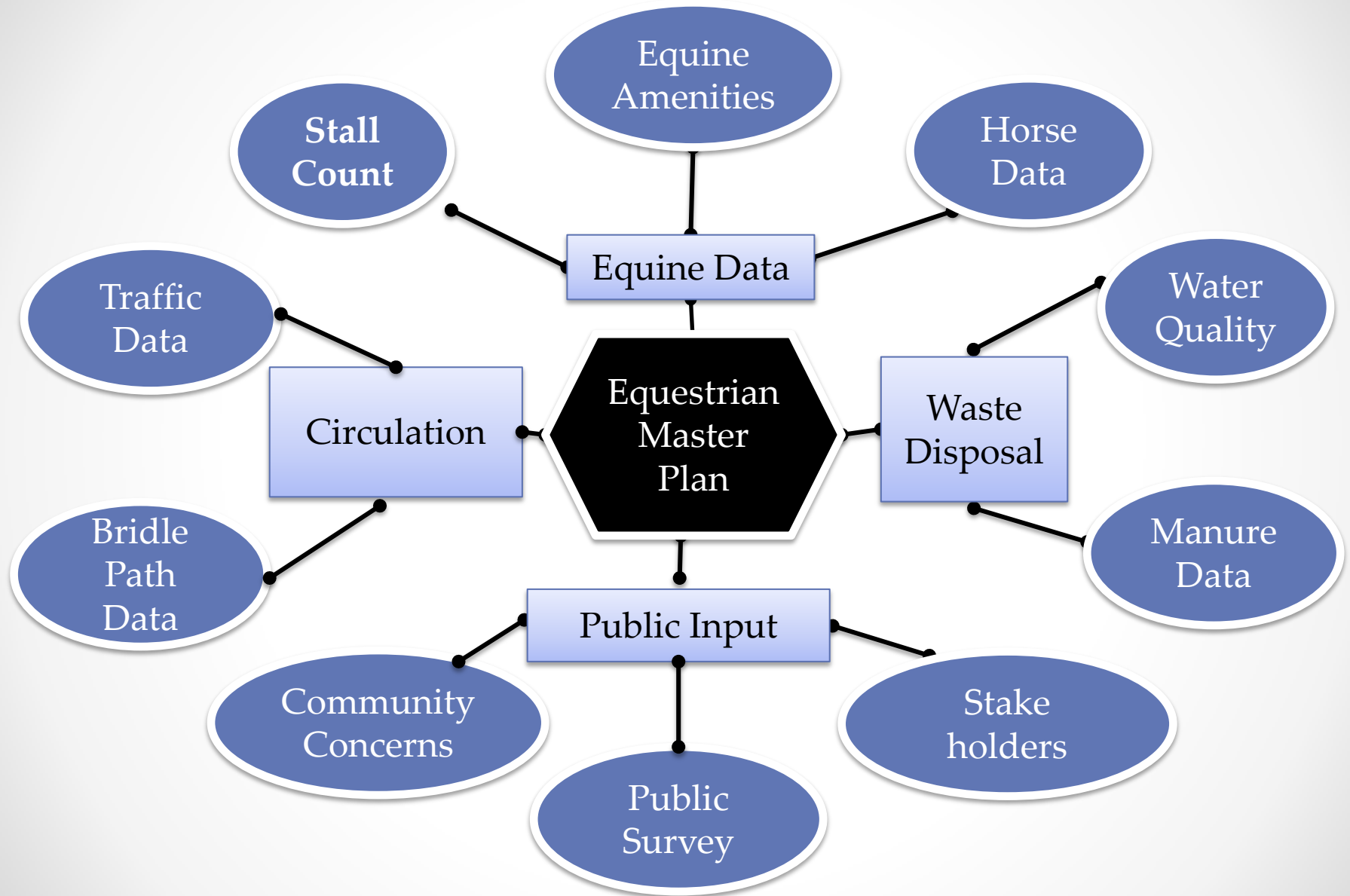
# Data gathering for Equestrian Master Plan



# Stakeholders

- People outside the EPA do not understand the needs of the equestrians
- We need to lengthen the equestrian season
- We need to expand the disciplines

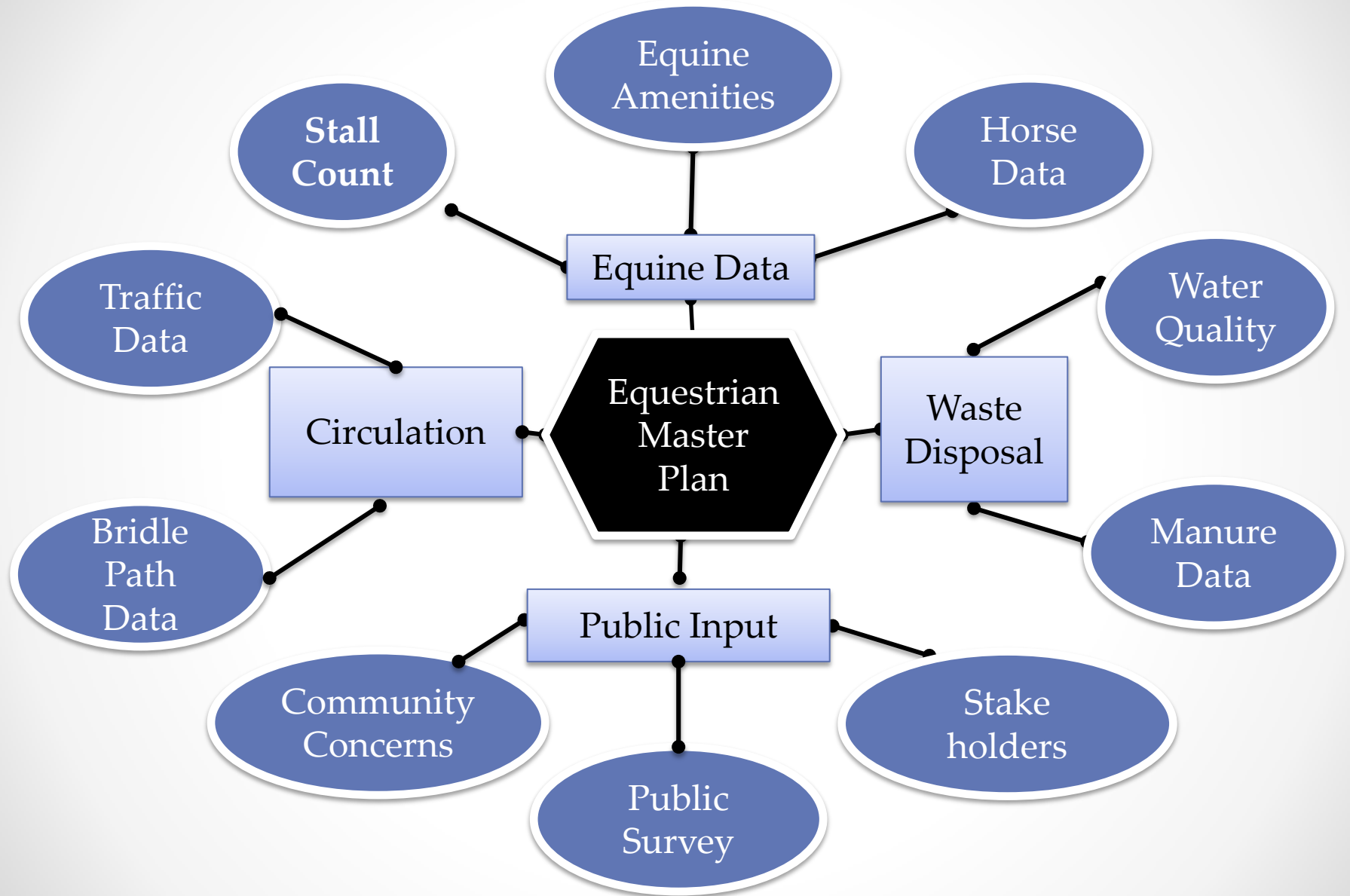
# Data gathering for Equestrian Master Plan



# Community concerns

- The horse and the horse's well being should be central to an equestrian master plan
- The Equestrian Preserve Area needs to maintain its current character
- It is desirable to have a mix of equestrian disciplines
- People outside the EPA do not understand the needs of the equestrians

# Data gathering for Equestrian Master Plan



# Survey

- iPads using Survey Pocket software at venues and activities
- 60 questions:
  - standard demographics
  - perceived issues
  - equestrian infrastructure
  - comparable equestrian destinations
  - need for future equestrian improvements

# Survey Observations

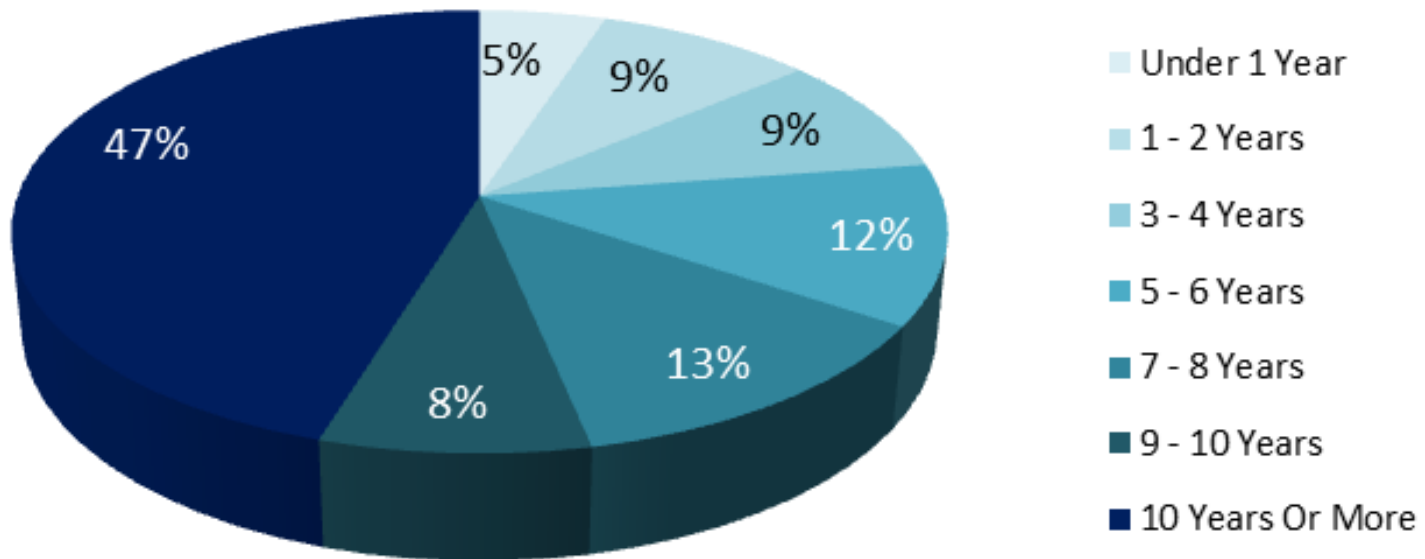
- Occurred in the midst of the controversy regarding the Equestrian Village, Dressage Center
- Formulated by staff and FAU after conversations with stake holders i.e. EPC, equestrian riders, trainers and farm owners
- Intent was to find common ground and common issues, while recognizing the current controversy
- Conducted - February and March 2012



# Respondents

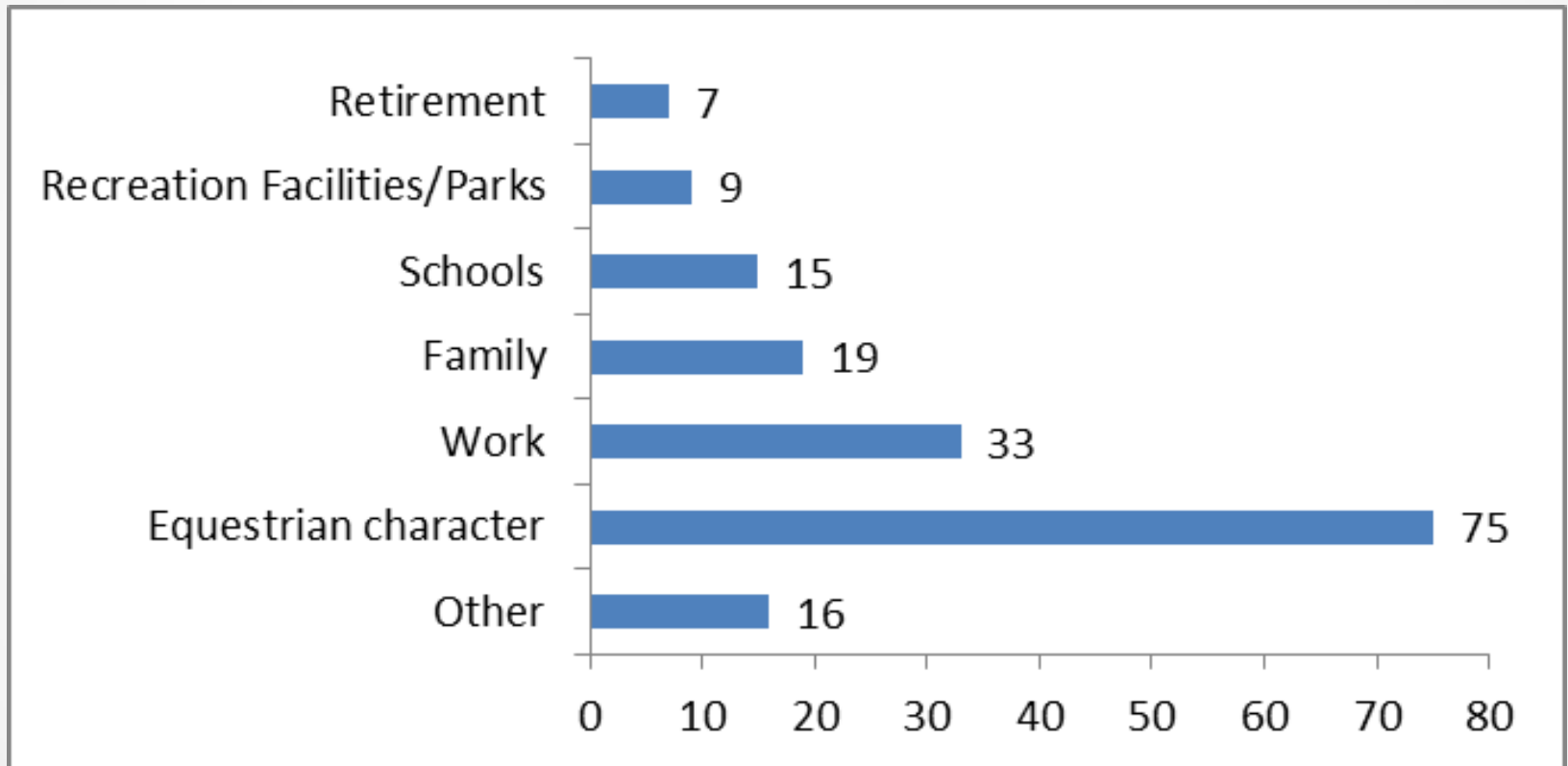
- 332 surveys
- 68% collected at PBIEC, 20 % at IPC, 8 % at Jim Brandon, 3 % Green Market, 1 % miscellaneous meetings
- 40 % of the respondents were Wellington residents
- 63 % of respondents consider themselves equestrians
- There are differences between various groups of respondents (residents – non residents, equestrians – non equestrians) that are outlined in the report.
- Primary difference is in strength of agreement or disagreement on specific issue, not in the overall direction

# Length of Residence in Wellington



(n=133)

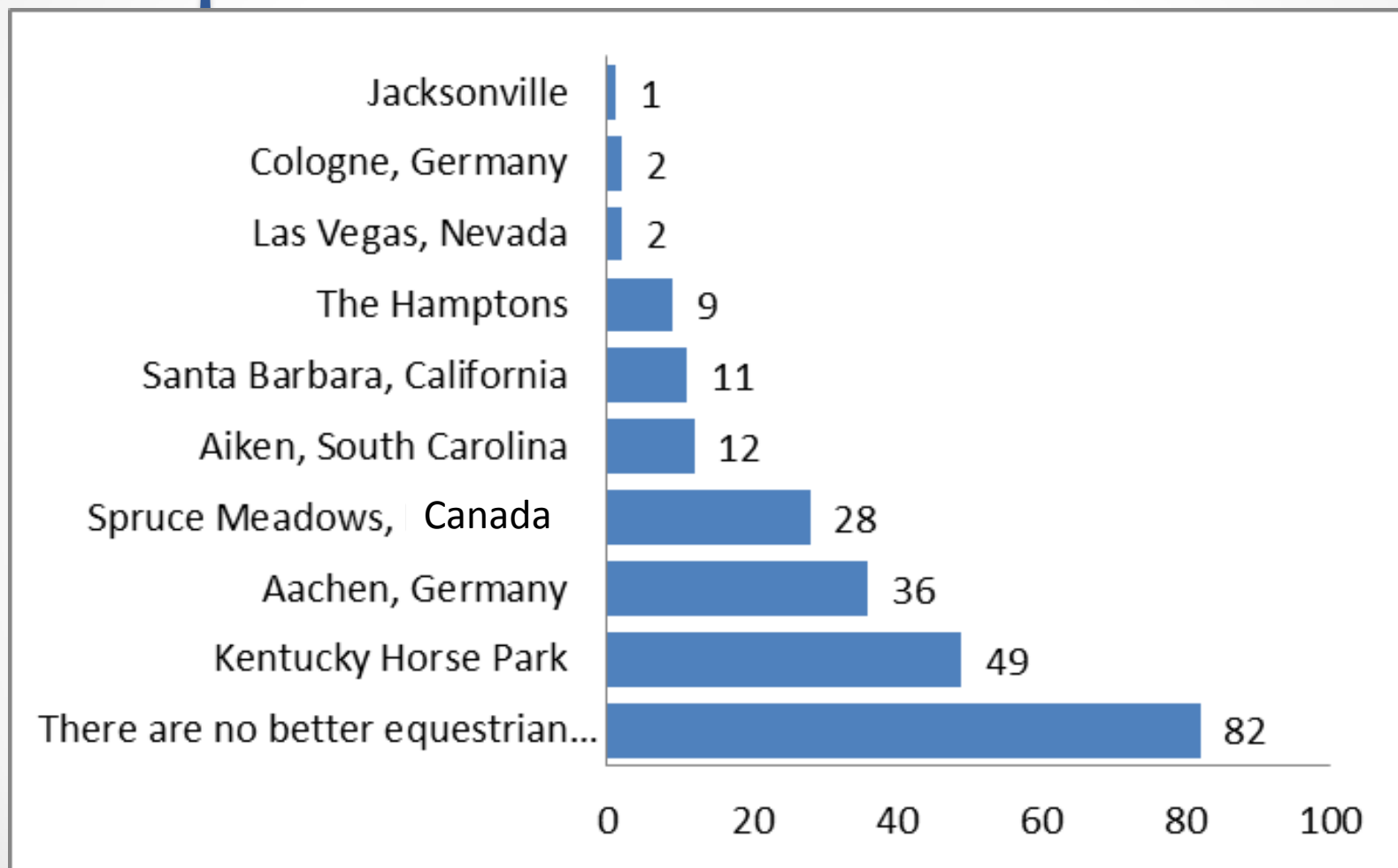
# Reason for moving to Wellington



(n=133)

- Respondents could give more than one answer

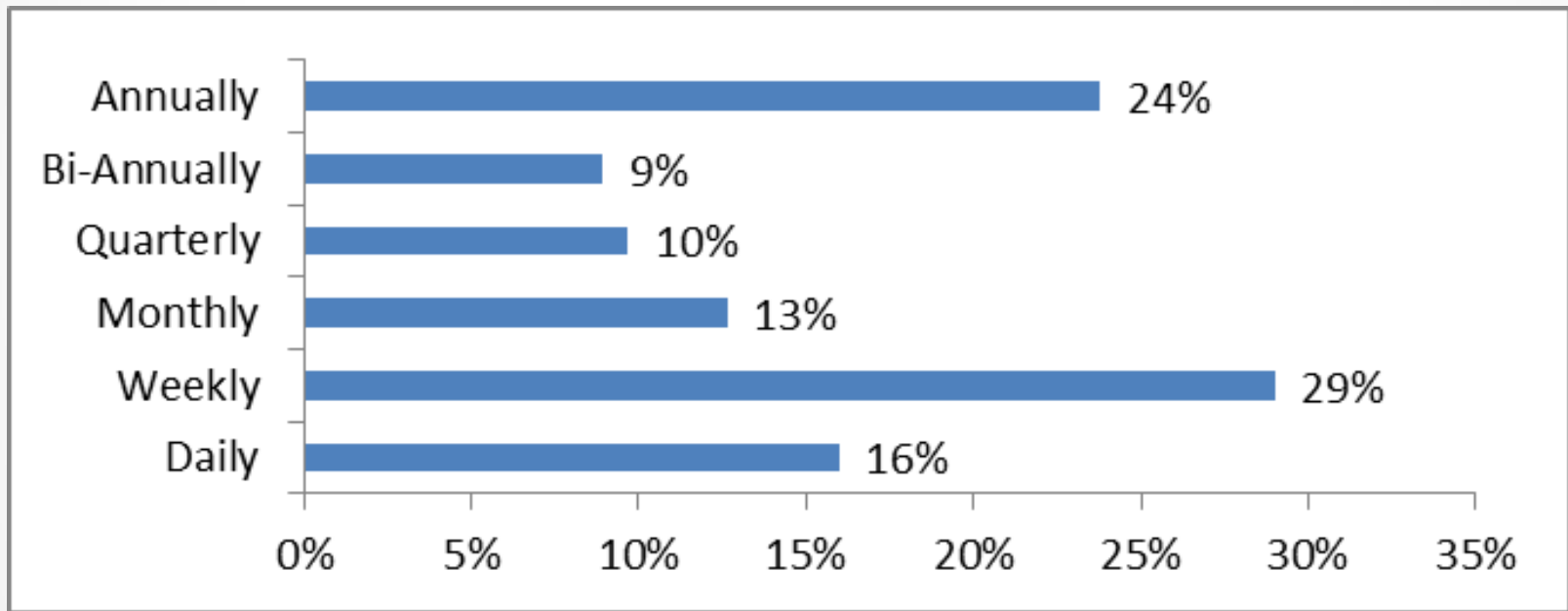
# Comparable or better equestrian communities



(n=232)

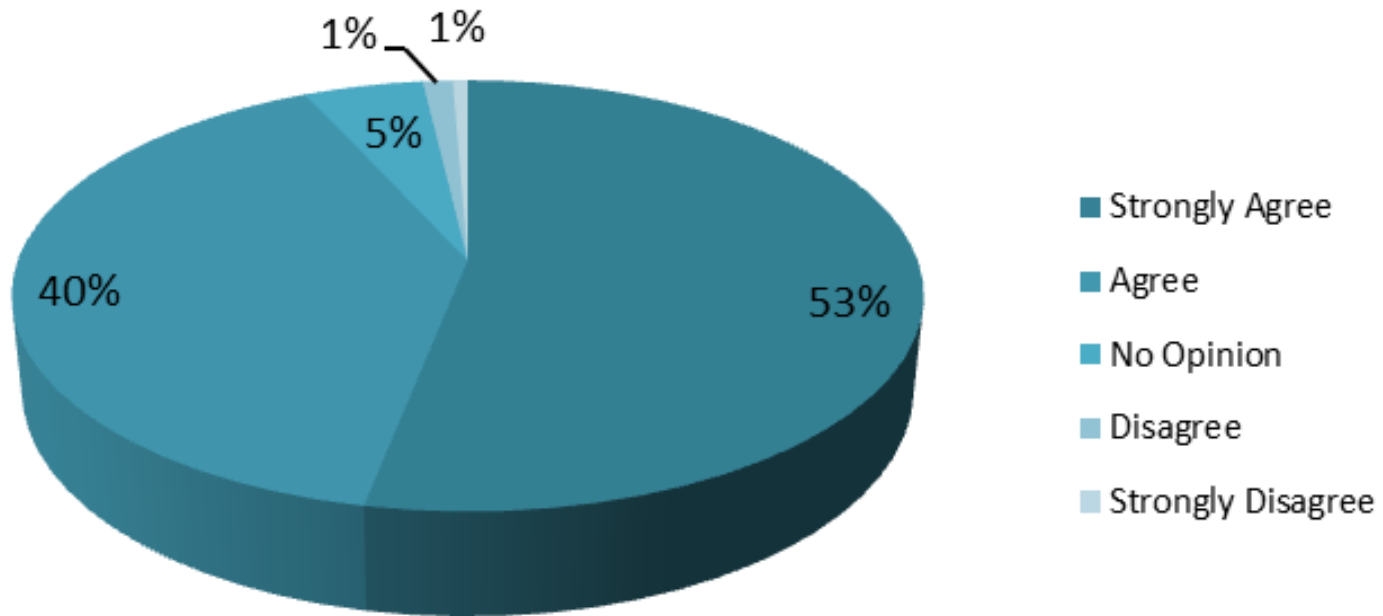
• Respondents could give more than one answer

# Frequency of attending equestrian events in Wellington



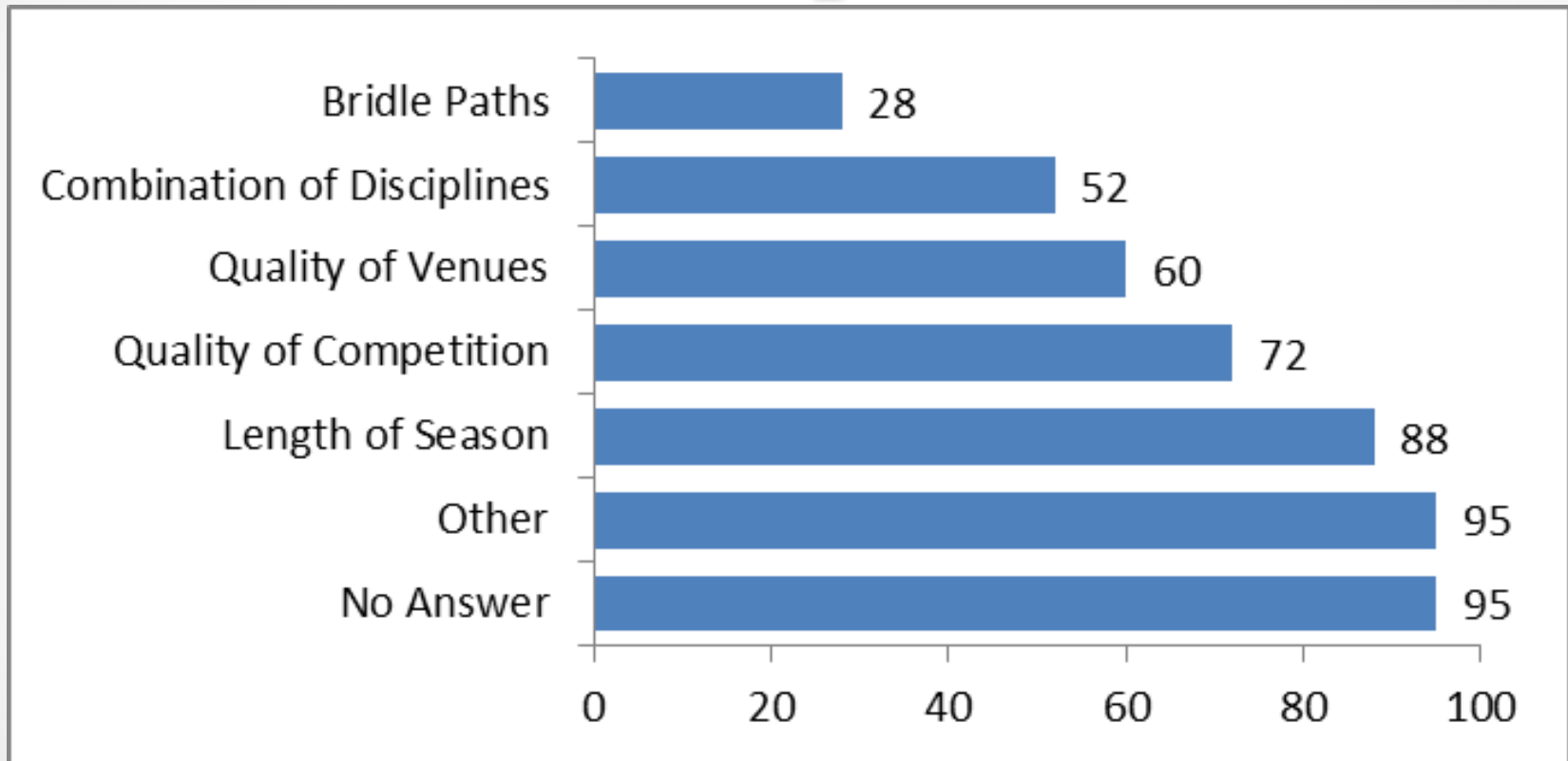
(n=269)

# Equestrian area is a major asset for everybody in Wellington



(n=322)

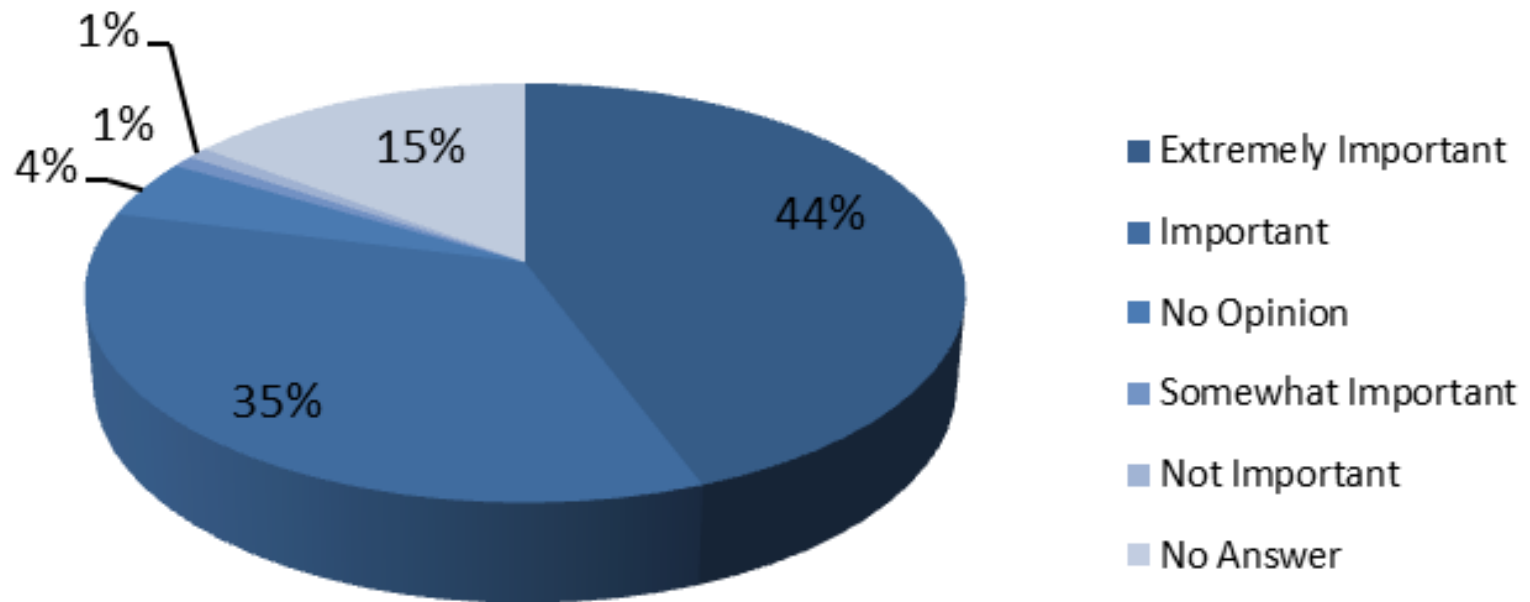
# What makes Wellington unique?



(n=322)

- Respondents could give more than one answer

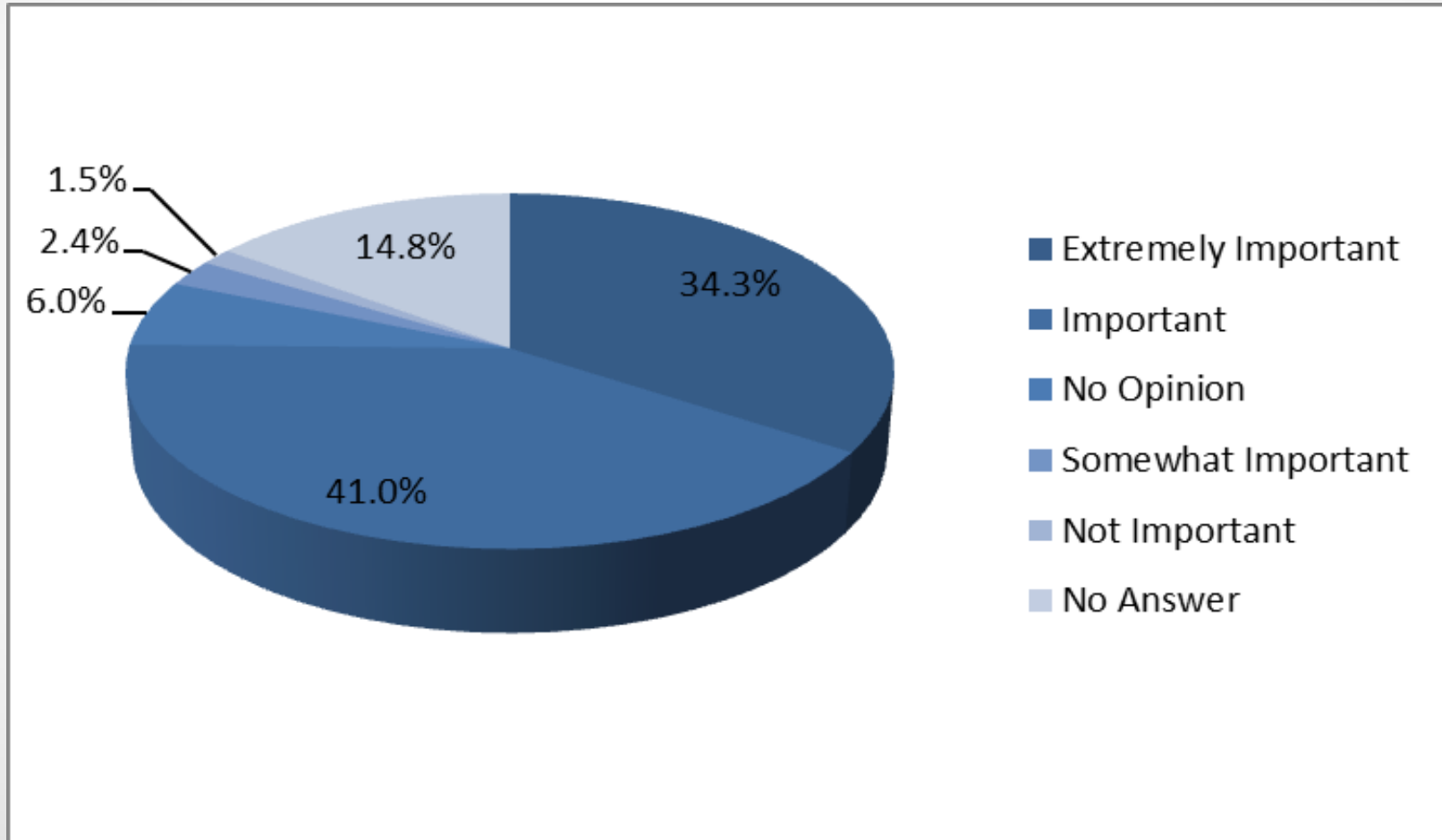
# Importance of intersection improvements



(n=322)



# Well connected system of bridle paths

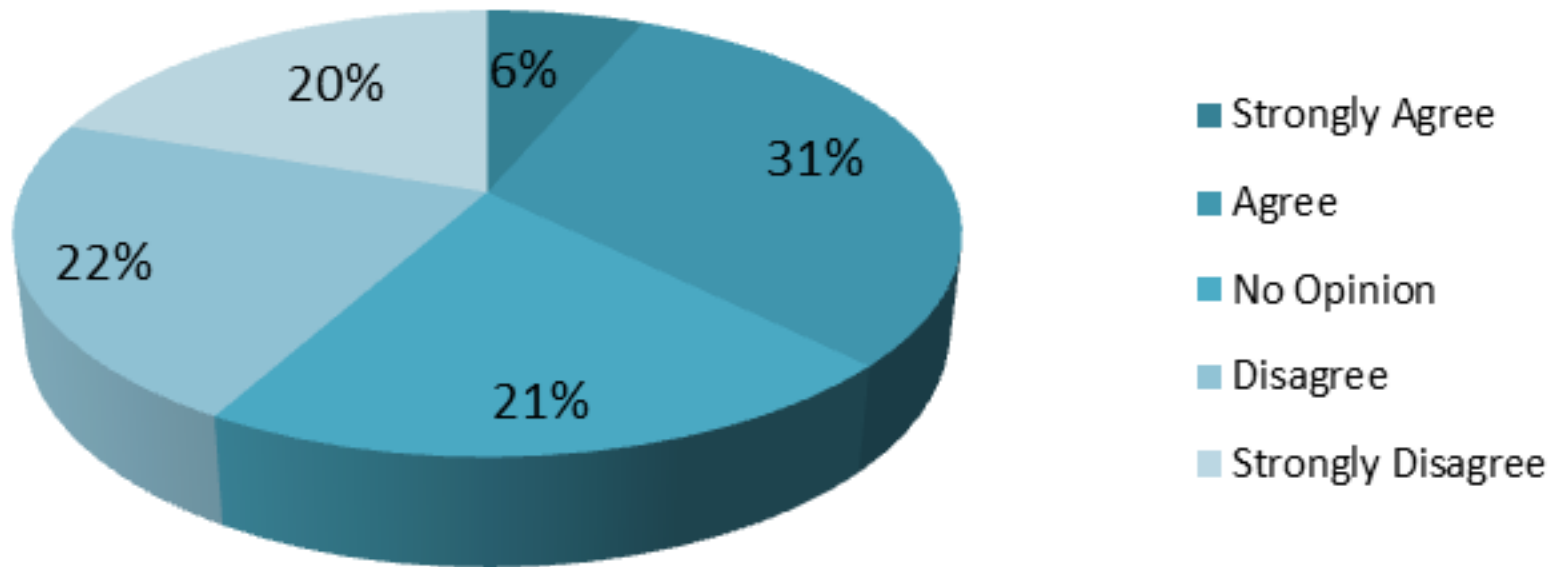


(n=332)

# There seems to be agreement that:

- Wellington is one of the best equestrian areas in the world.
- Mix of equestrian disciplines is one of the things that makes Wellington unique and desirable
- Wellington as a whole is better off because of the large equestrian presence.
- The horse needs to be central in any equestrian master plan
- Main improvements desired are bridle paths and road crossings

# Additional commercial development is desirable



(n=313)

# There is disagreement about:

- Additional commercial development
  - But 80 % of residents indicate that they are interested in maintaining the “character” of the Equestrian Preserve Area.
  - And only 23 % of residents indicate that they have been negatively impacted by the growth that has occurred in the Equestrian Preserve Area.

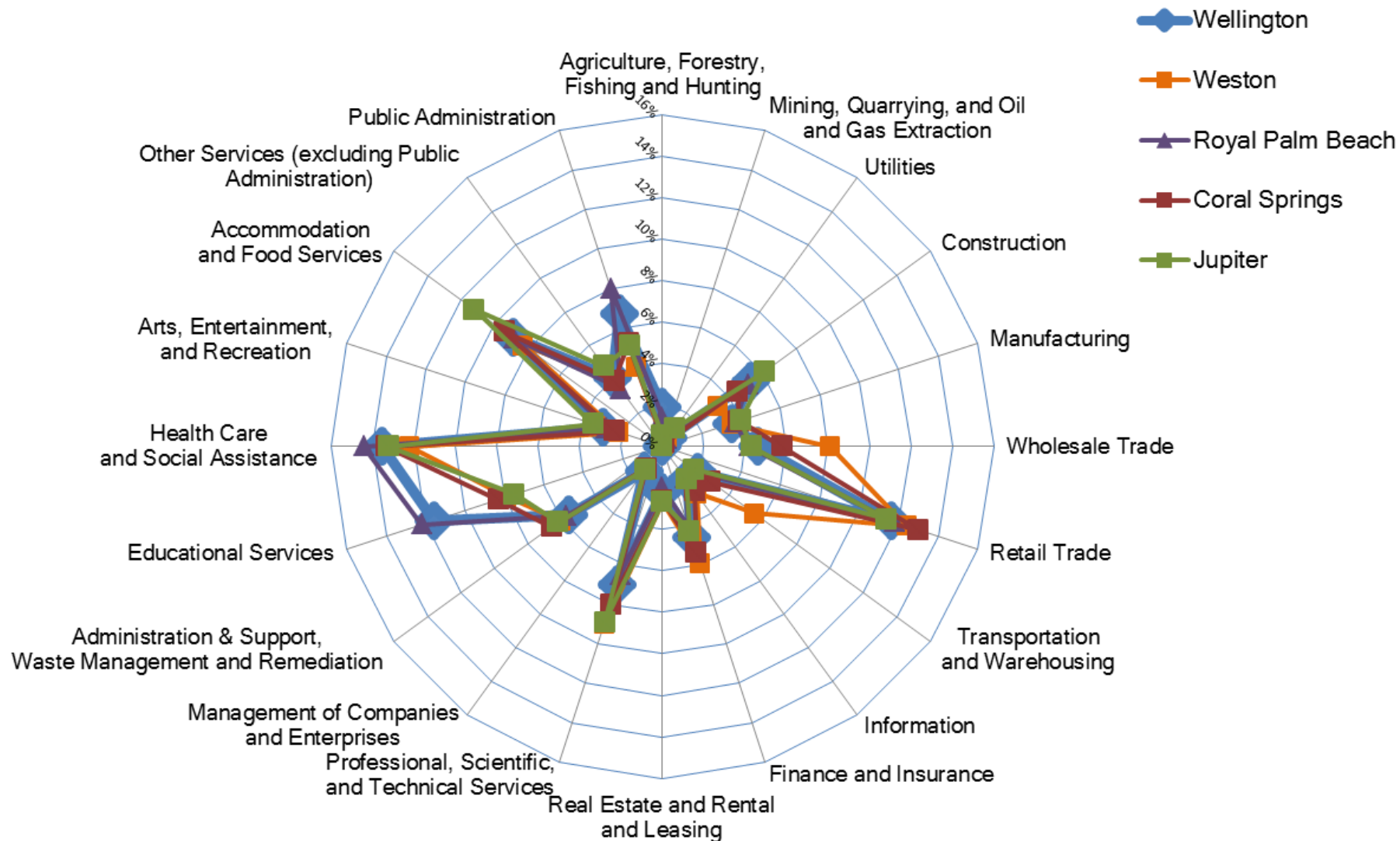
# Where are we?

- We have a reasonable understanding of the area.
- We have a reasonable understanding of the equestrian infrastructure needs and issues.
- We have a reasonable understanding of the common concerns among equestrians.
- We understand the main disagreements among equestrians.
- We do not know the opinions of non-equestrians.
- We are uncertain about the economic impact of the equestrian community on Wellington.

# Economic Impact:

- Is a regional economic generator within Palm Beach County
- Regional economic impact of \$185,450,000 according to the 2011 Equestrian Seasonal Economic Impact Report, prepared by Profile Market Research, June 2011
- Not sure how much of that contributes to Wellington's economy

# Industry Employment by City



# Economic Capture

	Region	Wellington
Total Economic Impact Region	\$185,451,115	
Horse related expenditures	\$145,857,302	Majority
Other expenditures	\$39,593,813	
Hotel	\$5,485,609	Very little
Shopping	\$7,503,380	?
Restaurants and Bars	\$12,108,412	?
Entertainment	\$14,427,770	?



# Where do we go from here?

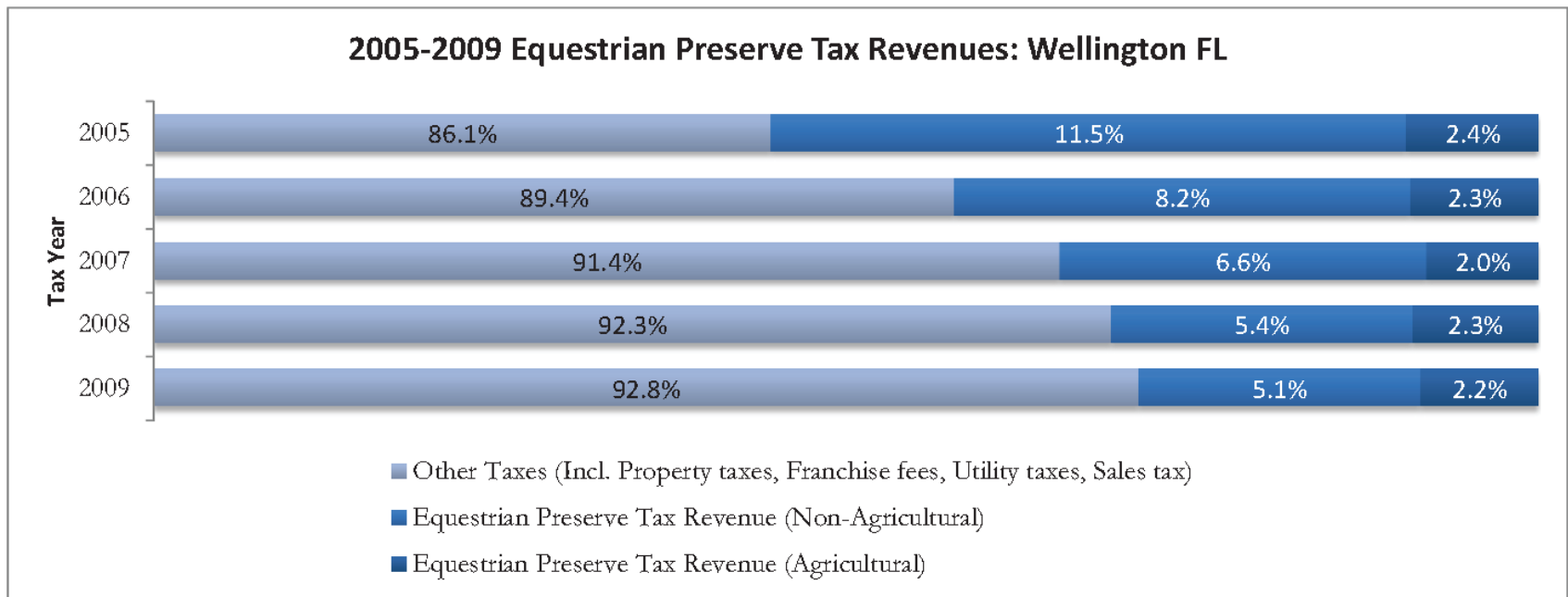
- Do nothing, (664 vacant or single family properties within the EPA by right could add 4,000-6000 stalls/horses)
- Make some improvements (bridle paths, improve horse crossings)
- Increase regulations (enforcement of current regulations, restrict amount of horses per acre)
- Restrict amount of commercial development in EPA
- Create a land use plan that directs intensification to certain areas (transfer of development rights)
- Develop a plan that locally captures the economic benefits of the equestrian presence
- Do more research

# Equestrian Data Collection

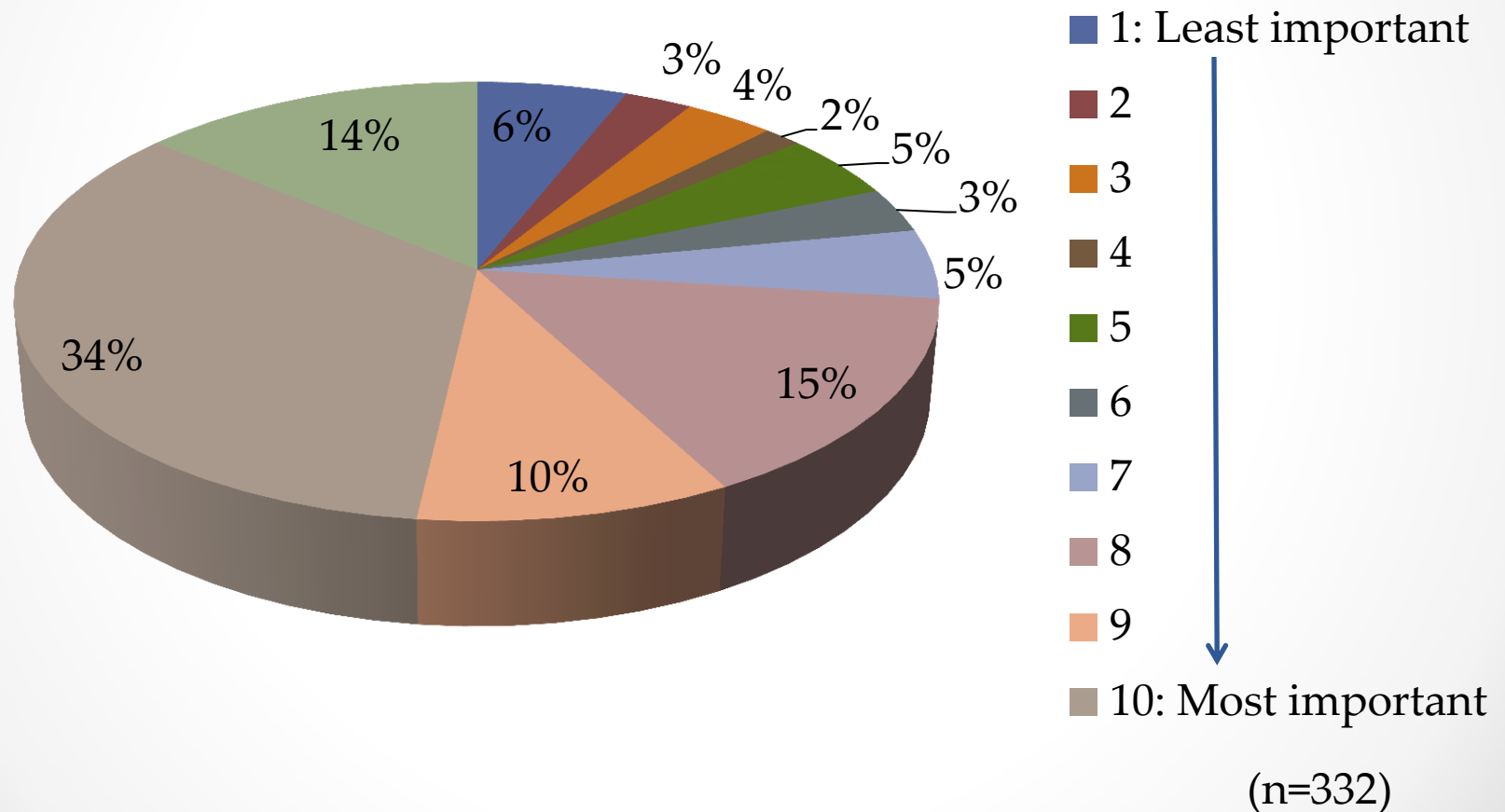
## DISCUSSION



# Contribution to Wellington Tax Revenue:



# Importance of Equestrian Activities



# Equestrian Data collection

- Preserve the lifestyle:
  - ✓ Follow the regulatory standards and enforcement measures as they exist
  - ✓ Limit development
  - ✓ Modify and correct the inconsistencies within the EPA
  - ✓ Evaluate the current LDR's and recommend changes
  - ✓ Study the economic impacts of the industry to determine the impact on Wellington

## Waste disposal:

### Manure Data

- 58,000 tons

### Water Quality

- Since the adoption of the BMP's in 2000, Phosphorus concentrations in the EPA have been reduced from an average of 250 PPB, to an average of 50 PPB
- The investment of nearly \$40 million to re-plumb the storm water system is keeping Wellington's storm water permit in compliance.
- Federal water quality std remain a work in progress and should the changes be enacted as proposed they could cost Wellington an additional \$30-\$40 million

## Circulation:

### Bridle Paths

- The 57 + miles of bridle paths are a value-added component within the EPA
- Horse & rider safety is the number one concern within the EPA according to the survey respondents
- Improving bridle path and ATV connections to the venues would add value to the bridle path system

### Traffic Data

- Alternative travel vehicles (golf cart etc.) is a rising concern as the number of ATV is increasing yearly
- Safe equestrian roadway crossings and separating ATV's from horses rank as the highest priority among equestrians
- Traffic mitigation standards to be developed to improve flow



# What's Next ?

- Explore a plan that will support expanding the equestrian industry?
  - ✓ Short term: improve connectivity between venues & improve equestrian road way crossings
  - ✓ Short term: review regulatory framework, identify potential changes that will protect and enhance the EPA while providing a blue print to guide future improvements, including commercial development
  - ✓ Long term: Identify properties that could accommodate additional equestrian venues, in and out of Wellington

# Equestrian Community Analysis:

- ✓ Is a regional economic generator within Palm Beach County
- ✓ Regional economic impact of \$185,450,000 according to the 2011 Equestrian Seasonal Economic Impact Report, prepared by Profile Market Research, June 2011
- ✓ High season - January, February and March. 25% boost to a limited segment of local economy.
- ✓ “Shoulders” of season are October, November, December, April, May and June which aid in extending the season in part
- ✓ The equestrian “product” can be defined as “lifestyle”

- ✓ This lifestyle is value-added to Wellingtons land & market values
- ✓ Currently +/- 274 vacant or un-developed properties within the EPA by right could add a minimum of 4,000 and a maximum of 6,000 stalls/horses
- ✓ Through community out reach, generalities can be made regarding horse, riders, trainers and owners, their needs, differences and commonalities
- ✓ Data yielded from public input identifies consensus about world class venues and concerns about, safety, trails, traffic and ATV's
- ✓ Commercial development – A key area of dissension within the community

- Integrate the equestrian identity into Wellington
  - ✓ Wellington is not Aspen or Hilton Head Island
  - ✓ We are not isolated from a metropolitan area
  - ✓ The equestrian venues draw the world's top competitors
- ✓ Recognize the different types of equestrians and identify their needs
- ✓ Embrace the equestrian lifestyle as part of our community, and culture
- ✓ Creating an equestrian master plan may be more of creating an equestrian vision
- ✓ Develop a master plan for the Village of Wellington with the equestrian community as a core component. The Plan should identify ways to incorporate equine activities into Wellington where possible.